



# Partners In Health

ENGAGE

## Training Institute Participant Packet

August 2017

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“Of all the forms of inequality, injustice in health care is the most shocking and inhumane.”

- Martin Luther King, Jr.

“There will be no equity without solidarity. There will be no justice without a social movement.”

- Dr. Joia Mukherjee

“But the poor person does not exist as an inescapable fact of destiny. His or her existence is not politically neutral, and it is not ethically innocent. The poor are a by-product of the system in which we live and for which we are responsible. They are marginalized by our social and cultural world. They are the oppressed, exploited proletariat, robbed of the fruit of their labor and despoiled of their humanity. Hence the poverty of the poor is not a call to generous relief action, but a demand that we go and build a different social order.”

- Fr. Gustavo Gutierrez

## Training Institute 2017 Agenda

### Purpose

- Build relationships / our movement
- Learn community organizing / campaign skills
- Commit to a yearlong campaign

### Saturday, August 12

Time	Location	Session	Page
8:30 – 9:00am	Commons	Registration & Breakfast	
9:00 – 9:30am	Commons	Welcome & Opening Remarks: Dr. Gary Gottlieb, Chief Executive Officer	
9:30 – 10:15am	Commons	Partners In Health Engage History	
10:15 – 11:15am	Commons	Keynote: Dr. Joia Mukherjee, Chief Medical Officer	
11:15 – 11:25am	Commons	Coffee Break	
11:25 – 11:45pm	Commons	Story of Self Workshop	7
11:45 – 12:45pm	Commons	Lunch and Skype Call: Dr. Paul Farmer, Co-Founder	
12:45 – 1:00pm	Commons	Story of Self Practice	11
1:00 – 2:00pm		<b>Breakout 1:</b>	
	Commons	Team Coordinators: Leading Teams	
	TJW	Advocacy Leads: Writing Letters to the Editor	13
	TBD	Fundraising Leads: Personal Fundraising	15
	TBD	CB Leads: Basics of CB Campaigns	16
2:00 – 2:20pm	Commons	Takeaways	
2:20 – 3:00pm	Commons	Group Photo, Networking Time	
3:00 – 5:30pm	Commons	Screening of Bending the Arc	
Evening		Informal hangouts in Boston	

## Sunday, August 13

Time	Location	Session	Page
8:30 – 9:00am	Commons	Breakfast	
9:00 – 9:30am	Commons	Agenda Overview	
9:30 – 10:30am	Commons	<b>Breakout 2:</b> Team Coordinators and CB Leads: Strategies for Recruitment and Retention	20
	TJW	Advocacy Leads: Meetings with Congress	19
	TBD	Fundraising Leads: Event Fundraising	17
10:30 – 11:30am	Commons	Discussion Panel with Engage Leaders	
11:30 – 12:30pm	Commons	Lunch	
12:30 – 1:30pm	Commons	Keynote: Sheila Davis, Chief of Clinical Operations	
1:30 – 2:30pm		<b>Breakout 3:</b> Team Campaigns Introduction and Workshop	22
2:30 – 3:00pm	Commons	Closing Takeaways	
Afternoon and Evening		Informal hangouts in Boston	



# Partners In Health's Mission, Model, and History

## Our Mission

Our mission is to provide a preferential option for the poor in health care. By establishing long-term relationships with sister organizations based in settings of poverty, Partners In Health strives to achieve two overarching goals: to bring the benefits of modern medical science to those most in need of them and to serve as an antidote to despair.

We draw on the resources of the world's leading medical and academic institutions and on the lived experience of the world's poorest and sickest communities. At its root, our mission is both medical and moral. It is based on solidarity, rather than charity alone.

When our patients are ill and have no access to care, our team of health professionals, scholars, and activists will do whatever it takes to make them well—just as we would do if a member of our own families or we ourselves were ill.

## Our Values

We strive to act in accordance to four main values: commitment, accompaniment, humility, and integrity.

### **Commitment: We are tenacious and resolute in our drive to attain social justice.**

- We are passionate about our work to break the cycle of poverty and disease.
- We push boundaries; we challenge conventions and the status quo.
- We set high standards of quality for ourselves and others.
- We strive to be efficient, effective, and focused on improving outcomes.
- We are devoted to this work for the long term.

### **Accompaniment: We make common cause with those in need.**

- We accompany our patients, colleagues, and partners, working shoulder to shoulder.
- We are responsive to the needs of the most vulnerable; we are flexible and nimble.
- We invest in others to maximize their potential and self-efficacy.
- We recognize that we cannot deliver on this cause alone; we embrace partners and partnerships to help further our work.



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## **Humility: We listen to and learn from others.**

- We are deeply attentive to those living in poverty, and are guided by their input and participation.
- We actively promote a trusting, supportive environment that fosters inclusion, confidence, and the open sharing of ideas.
- We interact with kindness, compassion, and respect.
- We acknowledge and learn from our mistakes.

## **Integrity: We operate with honesty and fairness.**

- We are purposefully frugal when we can be, ensuring that resources deployed maximize value to the patients and communities we serve.
- We are transparent and open in our actions and our work.
- We are responsible stewards of resources entrusted to us.

## Story of Self Workshop

### What is a Story of Self?

You tell a Story of Self to enable others to “get you” – to experience the values that call you not only to serve the cause you serve but to accept the responsibility to lead. The key is to focus on choice points: moments when your values counted in choices you made in response to challenge, to uncertainty. When did you first care about being heard, about others, about abuses of power, about poverty? Why? When did you feel you had to do something? Why did you feel you could? What were the circumstances? The power of a story of self is due less to the “high” or “tragic” drama than it is due to the courage you show in allowing others to see something of yourself. What you reveal to your listener does not have to be your deepest secret but instead should be the key shaping moments in your life.

### Incorporating Challenge, Choice, and Outcome in Your Own Story

Ask yourself questions to focus on choices you made along the way that brought you to this point in time as a leader. Once you identify a specific choice point that is particularly meaningful to you, dig deeper by trying to answer the following questions.

**Challenge:** Why did you feel it was a challenge? What was so challenging about it? Why was it your challenge?

**Choice:** Why did you make the choice you did? Where did you get the courage (or not)? Where did you get the hope (or not)? Did your parents’, grandparents’ or others life stories teach you how to act in that moment? How did it feel?

**Outcome:** How did the outcome feel? Why did it feel that way? What did it teach you? What do you want to teach us? How do you want us to feel?

A word about challenge: Sometimes people see the word challenge and think that they need to describe the misfortunes of their lives. A struggle can be of your own choosing – a high mountain you decided to climb, not just a valley you managed to climb out of. Any number of things may have been a challenge to you and can be the source of a good story to inspire others.



**Before you decide what part of your story to tell, think about these questions:**

1. Why am I called to leadership? What is my purpose in calling on others to join me in action? What will I be calling on them to do? Focus on the major project on which you are working with your team. Why did you decide to tackle this specific social problem? What stories can you tell to answer these questions?
2. What values move me to act? How might they inspire others to similar action?
3. What stories can I tell from my own life about specific people or events that would *show* (rather than tell) how I learned or acted on those values?

**What are the experiences in your life that have shaped the values that call you to leadership in this campaign?**

FAMILY & CHILDHOOD	LIFE CHOICES	ORGANIZING EXPERIENCE
Parents/Family Growing Up Experiences Your Community Role Models School	School Career Partner/Family Hobbies/Interests/Talents Experiences Finding Passion Experiences Overcoming Challenge	First Experience of Organizing Connection to Key Books or People Role Models

A good public story is drawn from the series of choice points that structure the “plot” of your life- the **challenges** you faced, **choices** you made, and **outcomes** you experienced.

**Challenge:** Why did you feel it was a challenge? What was so challenging about it? Why was it *your* challenge?

**Choice:** Why did you make the choice you did? Where did you get the courage—or not? Where did you get the hope—or not? How did it feel?

**Outcome:** How did the outcome feel? Why did it feel that way? What did it teach you? What do you want to teach us? How do you want us to feel?



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Use the space below to help craft your story using the structure of challenge, choice, and outcome.

If you'd like, you can try drawing pictures here instead of words. Powerful stories leave your listeners with images in their minds that shape their understanding of you and your calling. Remember, articulating the decisions you make in the face of challenges is what ultimately communicates your values.

<b>Challenge:</b>	
<b>Choice:</b>	
<b>Outcome:</b>	



### **For Further Reflection**

We all live very rich and complex lives with many challenges, many choices, and many outcomes of both failure and success. That means we will never be able to tell our entire life story in two minutes. The challenge is to learn to interpret our life stories as a practice, so that we can teach others based on reflection and interpretation of our own experiences, and choose stories to tell from our own lives based on what is appropriate in each unique situation.

Take time to reflect on your own public story, beginning with your story of self. You may go back as far as your parents or grandparents, or you may start with your most recent organizing and keep asking yourself why you got involved when you did. Focus on challenges you had to face, the choices you made about how to deal with those challenges, and the satisfactions—or frustration—you experienced. Why did you make those choices? Why did you do this and not that? Keep asking yourself why.

What did you learn from reflecting on these moments of challenge, choice, and outcome? How do they feel? Do they teach you anything about yourself, about your family, about your peers, your community, your nation, your world around you—about what really matters to you? What about these stories was so intriguing? Which elements offered real perspective into your own life?

What brings you to this campaign? When did you decide to work to advance the movement for global health equity? Why? When did you decide to volunteer? Why? When did you decide to give up a weekend to come to this workshop? Why?

Many of us active in public leadership have stories of both loss and hope. If we did not have stories of loss, we would not understand that loss is a part of the world; we would have no reason to try to fix it. But we also have stories of hope. Otherwise we wouldn't be trying to fix it.



## Practicing Your Story of Self

While giving feedback to others on their Story of Self, remember to balance both positive and constructive critical feedback. The purpose of coaching is to listen to the way stories are told and think of ways that the storytelling could be improved.

**DON'T** simply offer vague “feel good” comments. (“That was a really great story!”)

**DO** coach each other on the following points:

**THE CHALLENGE:** What were the specific challenges the storyteller faced? Did the storyteller paint a vivid picture of those challenges?

*“When you described \_\_\_\_\_, I got a clear picture of the challenge.”*

*“I understood the challenge to be \_\_\_\_\_. Is that what you intended?”*

*“The challenge wasn’t clear. How would you describe \_\_\_\_\_?”*

**THE CHOICE:** Was there a clear choice that was made in response to each challenge? How did the choice make you feel? (Hopeful? Angry?)

*“To me, the choice you made was \_\_\_\_\_, and it made me feel \_\_\_\_\_.”*

*“It would be helpful if you focused on the moment you made a choice.”*

**THE OUTCOME:** What was the specific outcome that resulted from each choice? What does that outcome teach us?

*“I understood the outcome to be \_\_\_\_\_, and it teaches me \_\_\_\_\_. But how does it relate to your work now?”*

**THE VALUES:** Could you identify what this person’s values are and where they came from? How? How did the story make you feel?

*“Your story made me feel \_\_\_\_\_ because \_\_\_\_\_.”*

*“It’s clear from your story that you value \_\_\_\_\_; but it could be even clearer if you told a story about where that value comes from.”*

**DETAILS:** Were there sections of the story that had especially good details or images (e.g. sights, sounds, smells, or emotions of the moment)?

*“The image of \_\_\_\_\_ really helped me identify with what you were feeling.”*

*“Try telling more details about \_\_\_\_\_ so we can imagine what you were experiencing.”*



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As you hear each other's stories, keep track of the details of each person's story. This will help you to provide feedback and remember details about people on your team later.

Name	Values	Challenge	Choice	Outcome

## Writing Letters to the Editor

A *Letter to the Editor (LTE)* is a letter sent to a publication about issues of concern from its readers. Letters to the editor are typically 150 words (that's short!) and have a single main point and single author (you, not PIH). A letter to the editor should be positive and current to hook in readers, while focusing on a clear and concise message about a problem.

*Let's practice!*

**What is the publication in which you are looking to get published?** (Ex. The Daily Free Press, BU Today, Boston Globe, etc.)

**What are the publication's rules for submitting Letters to the Editor?** (Hint: Use Google!)

**What is the problem you would like to discuss?** (Ex. Cuts to Global AIDS funding under the Obama administration has scaled back progress towards ending HIV/AIDS)

**What is the solution?** (Ex. Increase PEPFAR funding by \$300 million)

**What needs to happen to reach this solution?** (Ex. President Obama needs to increase funding in his upcoming budget proposal)

**Why is it relevant/what is the hook?** (Ex. President Obama can establish a legacy of his own and set a precedent for the next president)

**Can you explain this in 100-300 words?** (Practice on the back of this page!)



## Writing Letters to the Editor

Use the space below to write out a draft of your letter to the editor. Use the notes on the worksheet above and put it together here. After you read through it and check it over, you should be able to submit this letter!



## Personal Fundraising

Use this worksheet to brainstorm your talking points for your personal fundraising ask. Feel free to jot down bullets, write out full sentences, or even draw pictures in the boxes below.

### Your Story

Use this space to reflect on your personal story and why you are volunteering for PIH Engage. What brought you to this work? What inspires you about PIH? Why do you care about global health?

### PIH's Work

Use this space to reflect on PIH's healthcare delivery work. What aspects of PIH's work do you want to highlight? What would the donor's gift contribute to? What change is PIH trying to make and how are they doing it?

### Hard Ask

Use this space to write out your hard ask. How will you end the conversation? This question should be direct and specific, such as, "Would you be able to contribute \$25 to my personal fundraising page?"

# Community-Building Campaigns

## Campaign Brainstorming

Use the space below to jot down ideas from our brainstorming session:

Now, spend a few minutes drawing out your community-building campaign next year:

Fall

Spring

# Event Fundraising

## Setting Goals

1. **What does your team want to accomplish with this event?** Consider:

- What will this event bring to your broader community?
- How will this event help grow or strengthen your team of organizers?
- What will this event symbolize?
- How will this event bring you closer toward reaching your year-long goals?

2. **How many people do you want to attend this event?**

3. **How much money do you want to raise through this event?**

4. **Will you charge a registration fee?** If so, how much will it be?

\_\_\_\_\_ # of people attending this event, paying \_\_\_\_\_ each for registration

= \$\_\_\_\_\_ raised total from registration

5. **Will you ask people to incorporate personal fundraising?** If so, how much will you ask them to raise? How many people do you need to participate in personal fundraising at that amount?

\_\_\_\_\_ # of people doing personal fundraising, raising \$\_\_\_\_\_ each

= \$-\_\_\_\_\_ raised total from personal fundraising

6. **What physical things will you need for this event (space, set-up, goodies for participants, etc.)? What human resources will you need (registration table help, photographer, etc.)?**



**7. What is your target date for this event?**

In the space below, propose a planning calendar for the weeks leading up to your event. What has to be reserved, bought, or otherwise acquired? When and how will you invite people to participate? When and how will you confirm their attendance and remind them about the event?

3 months or more before event	<i>Consider: Is your space reserved? Have you and your team set goals?</i>
2 months or more before event	<i>Consider: Do you have a plan for recruitment? What will you need at the event?</i>
4 weeks before event	<i>Consider: How many people do you have registered? How are you checking in on progress?</i>
3 weeks before event	<i>Consider: How are you checking in on recruitment and fundraising progress? Have you secured all the items and volunteers you will need for the event?</i>
2 weeks before event	<i>Consider: Have you confirmed logistics? How are you publicizing the event?</i>
1 week before the event	<i>Consider: Are your attendees confirmed? Are logistics finalized? How close are you to your goal?</i>
After the event	<i>Consider: How are you following up with attendees, your volunteers, and the National Team?</i>

# Meetings with Members of Congress

## Visit Agenda

General Outline:

- Introductions
- Background--WHY is this important to us
  - Personal, sentimental, stories
  - Sprinkling: Facts, stats--use your handouts here!
  - Elected official's record on this issue
- **Make the ASK**
- Close/Follow Up

Personal Connection (2-3 sentences, Why do you care?)

MOC Connection (Why should your legislator care?)

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**ASK:**

Speaking Assignments

<b>Role</b>	<b>Name</b>
Personal Story/Stories (if someone has a deeper connection or longer story than others that is great--everyone should share why they care about the issue!)	
Note-taker	
Factoid 1	
Factoid 2	
Impact on other key issues the official cares about	
ASK	
Closing + Follow Up	



## Building Strategic Partnerships

Event/Campaign: \_\_\_\_\_

List potential partners here. Circle the one that your small group will focus on for the questions below.

1) Why might this organization want to partner with us?

2) Why might the organization not want to partner with us?

3) What strengths would the organization bring to our group?

4) How might partnering with them be a liability for us?

5) Who will be the point person for initiating the partnership?

Who will your partners be for the event above?

## Recruitment & Engagement

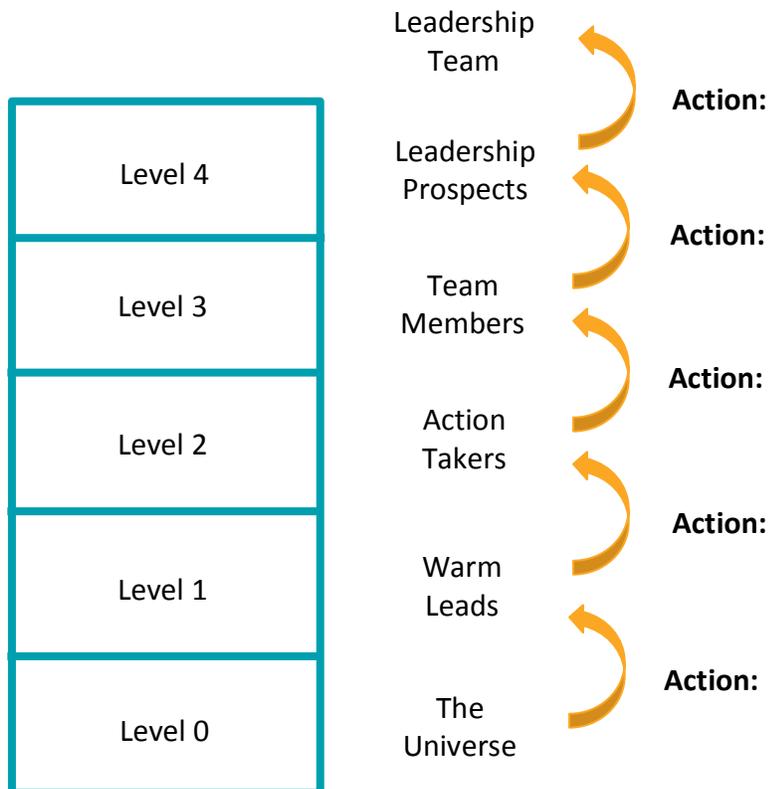
You can apply the concept of ladders of engagement to multiple aspects of your campaign. First, think about how you can bring members up the leadership ladder so that they can contribute more and more to building the movement for the right to health.

### Recruitment Ladder

Using the worksheet below, think about how a person completely new to PIH Engage might hear about your team, and what actions you can encourage them to take that would help them climb the ladder to a leadership position.

Start by choosing a PIH Engage Leadership position (Team Coordinator, Fundraising/Advocacy/Community-Building Lead) and writing it here:

Then, fill in actions for each level of the ladder, *starting at the bottom*, that would demonstrate their ability to take on the leadership position you chose above.



## Build Your Local Campaign

### What do you want to accomplish this year?

How will you translate this broad mission statement into real, measurable goals? And from there, how can you imagine a series of connected actions which will form your campaign peaks for the year?

### What is a campaign peak?

This is PIH Engage's way of pinpointing the specific events that will give your yearlong campaign shape and momentum. A "peak" could be anything from a fundraising event, to writing a letter to the editor, to a personal fundraising campaign, to a meeting with your member of Congress. The main idea is that each of these peaks has a date or timeline, a set of measurable goals associated with it, and builds power throughout the year to achieve your goals. An example: *In the spring, we will raise an additional \$3,000 by hosting a Strides in Solidarity walkathon, organize 2 panel discussions on specific global health topics, and bring 5 people each to 2 meetings with members of Congress.*

## Choosing campaign peaks

Be realistic, but also ambitious! And above all, think critically about *how each of your campaign peaks connects to and advances the PIH Engage mission.*

This is your chance to be creative and fun! Shape your campaign and choose your peaks to suit *your* team. However, there are a few moments that can be really powerful if the entire PIH Engage network comes together.

1. We need every team to participate in a personal fundraising push during the month of November. If we can all come together, share in the excitement and urgency, and work hard to reach out to as many people as possible, we can contribute a lot of resources to help support PIH's important work!
2. We need every team to use the specific advocacy tactics and timelines that we propose. Our advocacy power comes from thousands of people speaking with one voice, at the same time, in the same ways. There are certain moments and tactics that will most effectively advance us towards our advocacy goals, so we need everyone with us!
3. We believe that large-scale, culminating fundraising events are a great way to wrap up the year. In the past, many teams have hosted successful "Strides in Solidarity" walkathons or 5ks – consider hosting one this spring!

Now that your team has all the information it needs, commit to a series of campaign peaks that feel realistic and ambitious, connect to PIH Engage's mission, and move us towards our goals. Writing them on this timeline will help you visualize the year!



Jan. Feb. March April May June Summer →

## Goal-setting

Based on your mission statement, purpose, and campaign peaks, what are the specific, measurable goals that will make your campaign successful? Break down these goals in detail.

Note: Each peak will have different goals. Think about what would make your event a success in relation to your mission statement – Is it 50 people in attendance at a panel? \$3,000 dollars raised? One meeting with your Senator? Then, break down the specific steps you need to take to reach that goal (a timeline, number of people receiving an in-person invitation, etc.)

*Example: Strides In Solidarity Walkathon*

Goal: raise \$3,000

- If your Recruitment Team has 10 members, and they are each responsible for recruiting 10 participants: 100 participants x \$15 entry fee = \$1,500
- If each member gets 3 of their 10 participants to create a fundraising page: 30 participants set a goal of \$100, they each actually raise \$50, 30 participants x \$50 = \$1,500

TOTAL: \$3,000

Remember the SMART goals criteria!

**S**pecific

**M**easurable

**A**mbitious

**R**ealistic

**T**ime-bound



## Collective Goal-Setting Worksheet

	Detailed Goal Break-down
<b>Peak #1</b>  Date:  Location:  Primary Goal:	
	Detailed Goal Break-down
<b>Peak #2</b>  Date:  Location:  Primary Goal:	



<b>Detailed Goal Break-down</b>	
<b>Peak #3</b>  Date:  Location:  Primary Goal:	
<b>Peak #4</b>  Date:  Location:  Primary Goal:	